RRRL – Report/Request List

```
CAFSRRRL                    REPORT/REQUEST LIST               06/30/2016    10:59
USER ID : C81285                                                 PAGE NO:   1

TO SELECT, ENTER I=INQUIRE, M=MODIFY, V=INQUIRE(CID1), OR C=MODIFY(CID1)

R/R NO:           CAPS ID:              PROV:       000  WORKER ID: C81285
START FROM:                CO:     R/R CAT:              R/R STAT:

                  DATE      R/R                         DETERMIN   WORKER
SEL  RPT NO   RECEIVED   CAT STS REPORT NAME             END DATE   ASSGND
 _   0001169  06/23/2016  CPS  O  NEIGHBOR CHILD                    C81285
 _   0001131  10/03/2014  CPS  O  BARKER CHILD                      C81285
 _   0001130  10/03/2014  CPS  O  DINKLE KIDS                       C81285
 _   0001112  05/01/2014  CPS  O  NEIGHBOR CHILD                    C81285












                                                                   PATH: _
```

➢ This screen displays all of the Report/Request events in order by:
  - Date received
  - Most recent report on that date (if more than one referral on a specific date)

➢ The worker can INQUIRE/MODIFY (RRD1), or VIEW/CHANGE (CID1) up to fifty
  (50) referrals at one time. When the worker presses ENTER, RRD1 or CID1 will be
  displayed for the first referral. To page through the referrals selected, press F8 (forward)
  or F7 (backward).
  - NOTE: Workers cannot mix I/M select codes with V/C select codes

➢ Place the cursor under the WORKER ASSGND field and press F12 – the identifying
  information for that worker will be displayed.

➢ Available search criteria is R/R number, CAPS ID, PROVIDER ID, WORKER ID, Start
  From Date, County, Category and Status

"V" – Inquire CID1 Information

➢ If a CI worker or field worker selects a report/request that was originally added on CID1
  with a 'V', the worker will be taken to CID1 in INQUIRE mode

➢ If a CI worker or field worker selects a report/request that was originally added on RRD1

with a 'V', a message will display that says "CID1 DOES NOT EXIST"

"C" – Modify CID1 Information

➢ The select code of 'C' will only be valid for the assigned CI worker. If a field worker selects a report/request with a 'C', a message will display that says "USER DOES NOT HAVE UPDATE ACCESS"

➢ If a CI worker selects a report/request that was originally added on CID1 with a 'C', one of the following will occur:
- If the report/request is open and assigned to a CI worker, that worker will be taken to CID1 in modify mode for that report/request
- If the report/request was closed on CID1, a "USER DOES NOT HAVE UPDATE ACCESS" message will display
- If the report/request is assigned to a field worker, a "USER DOES NOT HAVE UPDATE ACCESS" message will display

➢ If a CI worker or field worker selects a report/request that was originally added on RRD1 with a 'C', a message will display that says "CID1 DOES NOT EXIST"

"M" – Modify RRD1 Information

➢ If a field worker selects a report/request that was closed on CID1 with an 'M', a message will display that says "USER DOES NOT HAVE UPDATE ACCESS"

➢ If a field worker selects a report/request that is assigned to a CI worker with an 'M' a message will display that says "USER DOES NOT HAVE UPDATE ACCESS"

➢ If a CI worker selects a report/request that was originally added on RRD1 with an 'M', a message will display that says "USER DOES NOT HAVE UPDATE ACCESS"

"I" – Inquire RRD1 Information

➢ A CI worker will be able to select all report/requests with an 'I'

➢ A field worker will be able to select all non-tribal report/requests with an 'I'

Adding a Referral

➢ If a CI worker presses F11 from RRRL, they will be taken to CID1 in add mode

➢ If a tribal field worker presses F11 from RRRL, they will be taken to RRD1 in add mode

RRD1 - Report Request Intake Detail 1

```
CAFSRRD1              REPORT/REQUEST INTAKE DETAIL 1      06/30/2016    10:51
USER ID : C81285   MODIFY                                        REPORT   1
R/R NUMBER: 0001085 R/R CATEGORY: CPS PRIORITY: 1 TAKEN BY: C74142CI PRIORS: N
INV START DATE: 08/26/2013   TIME: 08:29   ASSIGNED TO:  C74142SW
---------------------------- REPORTER DETAIL  ---------------------------------
REPORTER: MINNIE MOUSE                       REL: NBR SLFRPT: N  PH: 406
RPTR DETAIL: TESTING TESTING TESTING

------------------------ REPORT GENERAL INFORMATION ----------------------
REPORT NAME: DAISY DUCK                    PROV NO:         000
ADDRESS    : 754 RIVER ROCK RD                    PROV PHONE: 406
CITY/ST/ZIP: HELENA              MT 59602    COUNTY: 025  LEWIS & CLARK
PHONES:(1) 406 444-4444  REL: SLF W/H/C: H (2) 406           REL:     W/H/C:
INVESTIGATION SUMMARY: MINNIE IS CONCERNED FOR THE SAFETY OF DAISY.




DRUG USE SUSP:   DRUG LAB/MFG:      DRUGS:
FIRST CNTCT DT:             FIRST CNTCT TIME:        DETRM END DT:
R,FIRST CNTCT DT:            FIRST CNTCT TIME:        DETRM END DT:

                                                              PATH:
```

➤ Most of the information displayed on RRD1 is a "workable copy" of the information that was entered on the CID1 screen, for CPS workers' use
  - PRIORITY can only be modified by the regional RRC supertask worker

➤ The sixty (60) day determination requirement is based on the investigation start date (the date the report is received), not the first contact date

➤ PRIORS (upper right hand corner). This field is display only on RRD1 – it is entered by Centralized Intake unit staff on the CID1 screen

➤ INVESTIGATION SUMMARY. This field is used to enter a summary of the investigation. Investigation notes and documentation can be entered on RRD3 or uploaded to Doc Gen. Centralized Intake will use this area of RRD1 to help them to determine PRIOR history.

➤ The DRUG USE SUSP field will be required at the time of closure. DRUG LAB/MFG and DRUGS fields will be optional.

➤ Field workers (with the exception of tribal workers) **cannot** add CPS, CPI and CFS referrals on RRD1.

RRD2 - Report Request Intake Detail 2

```
CAFSRRD2               REPORT/REQUEST INTAKE DETAIL 2      06/30/2016    10:56
USER ID : C81285   MODIFY                                 PAGE NO:    1
R/R NUMBER: 0001085  CATG: CPS  CHILD PROT DATE: 08/26/2013 ASSGN TO: C74142SW
PROVIDER:         000                                              ALG:
                                                                  DET:
TO SELECT, ENTER D=DELETE, A=ADD, M=MODIFY, R=RELATION, P=PRIMARY
SEL CAPS-ID   FIRST         LAST                 SUFX   CATG
 _  00001238  DAISY         DUCK                         CH ALG: PHA
    AGE:  10 DOB: 05/15/2006 SEX: F ETH: CA  FAM ROLE:      DET: SUP
    R/R ROLE: V  LIVING ARRANGEMENT: SPF   HSPNC ORGN: N   REL: BFR
 _  00001239  DONALD        DUCK                         AD ALG:
    AGE:  35 DOB: 10/15/1980 SEX: M ETH: CA  FAM ROLE:      DET:
    R/R ROLE: P  LIVING ARRANGEMENT:        HSPNC ORGN: N   REL:
 _                                                          ALG:
    AGE:     DOB:           SEX:    ETH:     FAM ROLE:      DET:
    R/R ROLE:    LIVING ARRANGEMENT:         HSPNC ORGN:    REL:
 _                                                          ALG:
    AGE:     DOB:           SEX:    ETH:     FAM ROLE:      DET:
    R/R ROLE:    LIVING ARRANGEMENT:         HSPNC ORGN:    REL:
 _                                                          ALG:
    AGE:     DOB:           SEX:    ETH:     FAM ROLE:      DET:
    R/R ROLE:    LIVING ARRANGEMENT:         HSPNC ORGN:    REL:

                                                           PATH: _
```

➢ This screen initially captures the provider identification number if appropriate and information about all persons involved in the report

➢ Can search or add a person to the system
  - To search, press F12 in the CAPS ID field. CAPS will take you to PERS, and then PERL. If the person is found, select their CAPS ID with an "S".
  - If person is not found on PERL, press F11 (Add). Once added on PERD, press Shift-F9 to bring the person in the header back to RRD2.

➢ Can set up relationships between report persons using the "P" and "R" select codes

➢ Living arrangement (F12 lookup) will be required for each victim on the report

➢ If allegations are substantiated, the worker should enter the determination code of SUP (substantiation pending) to allow due process to the perpetrator. After 30 days, if no fair hearing is requested, the code will be changed to SUB. If a fair hearing is requested, the code will be changed to FHR. If the substantiation is overturned the code will be changed to UNX. If criminal charges are pending, the code will be changed to CCP and pending the outcome of the charges will then be changed to SUB or to FHR, SUB or UNX depending on whether a fair hearing is or is not requested.

RRD3-Report/Request Intake Detail 3

```
CAFSRRD3                REPORT/REQUEST INTAKE DETAIL 3      04/10/2008    15:37
USER ID : CS4566    MODIFY
R/R NUMBER: 0001350  CATG: CPS CHILD PROT   DATE: 03/01/08  ASSGN TO: C74142SW


THIS SCREEN CAN BE USED TO RECORD MISCELLANEOUS INFORMATION REGARDING THE INTAKE
AND/OR THE INVESTIGATION.   THIS SCREEN IS NOT REQUIRED.   THE WORKER HAS 18 LINES
OF AVAILABLE SPACE FOR TEXT.




                                                                    PATH:
```

➢ This screen is used to enter comments associated with the report/referral from RRD1
   and/or RRD2

➢ To access this screen type RRD3 in the PATH from either RRD1 or RRD2. (Be sure to
   update RRD1/RRD2 before accessing RRD3)

➢ Up to 18 lines of comments can be written
   -    If more comment space is needed, notes should be added through use of the
        DocGen system

RRRL – Report/Request List

```
CAFSRRRL                    REPORT/REQUEST LIST              06/30/2016    10:59
USER ID : C81285                                             PAGE NO:    1

TO SELECT, ENTER I=INQUIRE, M=MODIFY, V=INQUIRE(CID1), OR C=MODIFY(CID1)

R/R NO:          CAPS ID:              PROV:        000  WORKER ID: C81285
START FROM:               CO:      R/R CAT:              R/R STAT:

               DATE      R/R                           DETERMIN   WORKER
SEL  RPT NO  RECEIVED    CAT STS REPORT NAME            END DATE   ASSGND
_    0001169 06/23/2016  CPS  O  NEIGHBOR CHILD                    C81285
_    0001131 10/03/2014  CPS  O  BARKER CHILD                      C81285
_    0001130 10/03/2014  CPS  O  DINKLE KIDS                       C81285
_    0001112 05/01/2014  CPS  O  NEIGHBOR CHILD                    C81285




                                                                  PATH: _
```

➢ This screen displays all of the Report/Request events in order by:
- Date received
- Most recent report on that date (if more than one referral on a specific date)

➢ The worker can INQUIRE/MODIFY (RRD1), or VIEW/CHANGE (CID1) up to fifty (50) referrals at one time. When the worker presses ENTER, RRD1 or CID1 will be displayed for the first referral. To page through the referrals selected, press F8 (forward) or F7 (backward).
- NOTE: Workers cannot mix I/M select codes with V/C select codes

➢ Place the cursor under the WORKER ASSGND field and press F12 – the identifying information for that worker will be displayed.

➢ Available search criteria is R/R number, CAPS ID, PROVIDER ID, WORKER ID, Start From Date, County, Category and Status

CID1 – Centralized Intake Detail 1

```
CAFSCID1                 CENTRALIZED INTAKE DETAIL 1        07/11/2016    10:55
USER ID : C81285   MODIFY                                        REPORT   1
R/R NUMBER: 0001074 R/R CATEGORY: CPS PRIORITY: 3 TAKEN BY: C74142CI PRIORS: N
INV START DATE: 05/01/2013  TIME: 15:01  ASSIGNED TO:  C74142CI  WORKER
-------------------------- REPORTER DETAIL  --------------------------------
REPORTER: ANNIE APPLE                     REL: NBR SLFRPT: N  PH: 406 444-1234
RPTR DETAIL: LIVES NEXT DOOR TO THE MOUSE FAMILY


----------------------- REPORT GENERAL INFORMATION  -----------------------
REPORT NAME: MINNIE MOUSE              PROV NO:        000
ADDRESS    : 754 RIVER ROCK RD               PROV PHONE: 406
CITY/ST/ZIP: HELENA              MT 59602    COUNTY: 025  LEWIS & CLARK
PHONES:(1) 406 443-4321  REL: SLF W/H/C: H (2) 406       REL:    W/H/C:
INVESTIGATION SUMMARY: CONCERNS CHILDREN ARE BEING EXPOSED TO PARENTAL METH
USE AND/OR METH MANUFACTURING IN THE HOME.




DRUG USE ALLEGED: Y DRUG LAB/MFG: Y DRUGS: MET
FIRST CNTCT DT:           FIRST CNTCT TIME:       DTRMN END DATE:
RFIRST CNTCT DT:            FIRST CNTCT TIME:       DTRMN END DATE:
                                                  -
                                                       PATH:
```

➢ A CI worker can add a report/request with any report/request category type

➢ The "ASSIGNED TO:" field will be defaulted to the WORKER ID of the worker adding the report/request.
  - The field next to the "ASSIGNED TO:" field will contain the last name (as many characters as possible) of the worker whose USER ID appears in the "ASSIGNED TO:" field

Assigning reports on CID1

➢ The CI worker adding the report/request will decide if the report/request should be assigned to a field worker. If so, the CI worker can change the "ASSIGNED TO:" USER ID from their ID to another worker.
  - If the CI worker changes the "ASSIGNED TO:" USER ID from their ID to another CI worker, a message will appear that says "MUST ASSIGN TO A NON CI WORKER"
  - If the CI worker changes the "ASSIGNED TO:" USER ID from their ID to a field worker ID, a confirm message will appear that says "TO CONFIRM, PRESS F16(SHIFT + F4), TO CANCEL PRESS ENTER". This will ensure that the CI worker is done with the report/request.
  - The DRUG USE ALLEGED field will be required at the time of transfer. DRUG LAB/MFG and DRUGS fields will be optional.
  - The PRIORITY field will be required at the time of transfer.

- The report/request information will then be "frozen". This means that the report/request can no longer be modified on CID1.
- A "workable" copy will be created once the report/request is assigned to a field worker
- The "original" and "workable" copy will have the same report number.
- Field workers will be able to make the required changes to their "workable" copy on RRD1, RRD2 and RRD3

Closing reports on CID1

➢ If a CI worker closes a report/request, a confirm message will appear that says "TO CONFIRM, PRESS F16(SHIFT + F4), TO CANCEL PRESS ENTER"
- This will ensure that the CI worker is done with the report/request
- The report/request will then be "frozen". This means that the report/request can no longer be modified on CID1
- RRC supertask workers will not be able to reopen report/requests that were closed on CID1
- CIC supertask workers will be able to reopen report/requests that were closed on CID1
- CI workers can only close R/R CATEGORY of 'CPI' on CID1. All other R/R CATEGORIES must be re-assigned to a field worker.

Functionality

➢ CI workers cannot enter data in the "INVESTIGATION START DATE:", "DETERMINATION END DATE:", or "ACTION TAKEN:" fields when a report/request has a category type other than 'CPI' . If data is entered in these fields for a R/R CATEGORY other than 'CPI' a message will display that says "WHEN USING THIS CATEGORY TYPE, FIELD MUST BE BLANK"

➢ CI workers will be able to modify all enterable fields until the report/request is re-assigned to a field worker or closed by a CI worker on CID1

➢ The INVESTIGATION SUMMARY field is enterable by CI. However, unless the R/R CATEGORY is 'CPI' and is going to be closed on CID1, CI workers should add any and all comments as TEXT and reserve this area for the field worker

➢ CI workers will be taken to CID2 automatically when a report/request is added and the R/R CATEGORY is 'CPS', or 'LIC'
- If the R/R CATEGORY is something other than 'CPS', or 'LIC', the worker will not be taken to CID2 automatically. The worker can type CID2 in the PATH and press ENTER to access CID2
- A CI worker will not be taken to CID2 automatically when inquiring or modifying on a report/request. The worker can type CID2 in the PATH

Alerts

- RO1003 – REPORT &01 ADDED will be created for the supervisor of the 'TAKEN BY' ID

- RO1012 - REPORT &01 ASSIGNED BY CI WORKER &02 will be created when a report is re-assigned to a field worker. The alert will be created for both the new assigned worker and their supervisor

- RO1008 - REPORT &01 NEED TO BE COMPLETED will be deleted from the CI workers alert when a report is re-assigned to a field worker
  - A new RO1008 alert is created for the reassigned worker (field worker) and their supervisor

CID2 – Centralized Intake Detail 2

```
CAFSCID2                 CENTRALIZED INTAKE DETAIL 2          07/11/2016    11:06
USER ID : C81285   MODIFY                                    PAGE NO:    1
R/R NUMBER: 0001074  CATG: CPS  CHILD PROT DATE: 05/01/2013 ASSGN TO: C74142CI
PROVIDER:         000                                          ALG:

TO SELECT, ENTER D=DELETE, A=ADD, M=MODIFY, R=RELATION, P=PRIMARY
SEL CAPS-ID    FIRST        LAST               SUFX   R/R ROLE
 _  00001661  MANDY        MOUSE                        V     ALG: EMD
    AGE:  11   DOB: 05/25/2005    SEX: F    ETH: CA
    FAM ROL:     CATG: CH          HSPNC ORGN: N        PRP REL:
 _  00001662  MARKIE       MOUSE                        V     ALG: EMD
    AGE:   7   DOB: 10/10/2008    SEX: M    ETH: CA
    FAM ROL:     CATG: CH          HSPNC ORGN: N        PRP REL:
 _  00001659  MICKEY       MOUSE                        P     ALG:
    AGE:  41   DOB: 02/25/1975    SEX: M    ETH: CA
    FAM ROL:     CATG: AD          HSPNC ORGN: N        PRP REL:
 _  00001660  MINNIE       MOUSE                        P     ALG:
    AGE:  39   DOB: 08/10/1976    SEX: F    ETH: CA
    FAM ROL:     CATG: AD          HSPNC ORGN: N        PRP REL:
 _                                                            ALG:
    AGE:       DOB:              SEX:      ETH:
    FAM ROL:     CATG:             HSPNC ORGN:          PRP REL:

                                                             PATH: _
```

➢ CID2 is accessed from CID1. Workers are either taken to CID2 automatically (R/R CATEGORY of 'CPS', or 'LIC'), or by typing CID2 in the PATH and pressing ENTER

➢ CI workers will be able to modify all enterable fields until the report/request is re-assigned to a field worker or closed by a CI worker on CID1

➢ Because CI workers will not be entering DETERMINATIONS on CID2, the RO1011 – "CHANGE DETERMINATION FROM SUP TO SUB IF NO REQUEST FOR FAIR HEARING" alert will not be created

Duplicate Person Resolution

➢ CAPS has a duplicate resolution process where a worker can contact Margaret Jennings-Jeffrey and request that a duplicate CAPS ID be deleted for a person/client. If a CAPS ID is marked for deletion, all information that is tied to that ID will be transferred to the ID that was kept.

Unfounded Report Purge Program

➢ CAPS has a process to purge CPS referrals when a report is determined to be 'UNS' (Unsubstantiated) or 'UNF' (Unfounded) or 'FND' (Founded) 'UNX' (Unsubstantiated After Review) after three years if no other reports are substantiated within that timeframe. CPI referrals determined to be 'UNS' (Unsubstantiated) or 'UNF' (Unfounded) or 'FND' (Founded) that are over 1 year old are purged. The purge process is run once a month during nightly processing. The process checks all reports currently in CAPS by sweeping the database. Each report is checked to see if the report meets the purge requirements and, if those requirements are met, the report is purged.
   o **The system will determine if a CI report exists and purge that report as well.**

Unsubstantiated Report Purge Program

➢ CAPS has a process to purge CPS referrals when a report is determined to be 'UNS' (Unsubstantiated) or 'UNX' (Unsubstantiated After Review) and CPI referrals after three years if no other reports are substantiated within that timeframe. The purge process is run once a month during nightly processing. The process checks all reports currently in CAPS by sweeping the database. Each report is checked to see if the report meets the purge requirements and, if those requirements are met, the report is purged.
   o **The system will determine if a CI report exists and purge that report as well.**

CAPS Notes and DocGen System

There are a couple of important items to note:
- ➢ **The URL for CAPS DocGen is https://js.hhs.mt.gov:8445/CAPSDocGen/ This URL is case-sensitive, so you must enter it EXACTLY as shown.**
- ➢ In order to use CAPS DocGen, you must have Adobe Reader loaded on your machine. If you do not already have Adobe Reader, this download is free and can be accessed through the Adobe website (www.adobe.com). If you have questions or concerns about downloading this software, contact your supervisor or network staff person.
- ➢ You DO NOT have to currently be in the CAPS system in order to run documents or to save or retrieve notes. Documents and notes are no longer "screen" specific.
- ➢ PLEASE log out following the logout procedures provided in this document.
- ➢ Use the menu options on the left of the screen or the link options on the bottom of the screen. **Do not use the BACK or FORWARD buttons to navigate in CAPS DocGen**.
- ➢ Should you receive any errors while attempting to process a document, store or retrieve notes, please contact the CAPS Help Desk as soon as possible.

Creating a Desktop Shortcut

The easiest way to access the CAPS DocGen system is to select the icon that will display directly on your desktop. This way, when you select that icon, the CAPS DocGen Logon page will open and you don't have to keep trying to remember the URL! If you do not already have a CAPS DocGen icon, you can create one following these steps:

- ➢ Access the CAPS DocGen Logon page, click on FILE, select SEND, and select SHORTCUT TO DESKTOP.
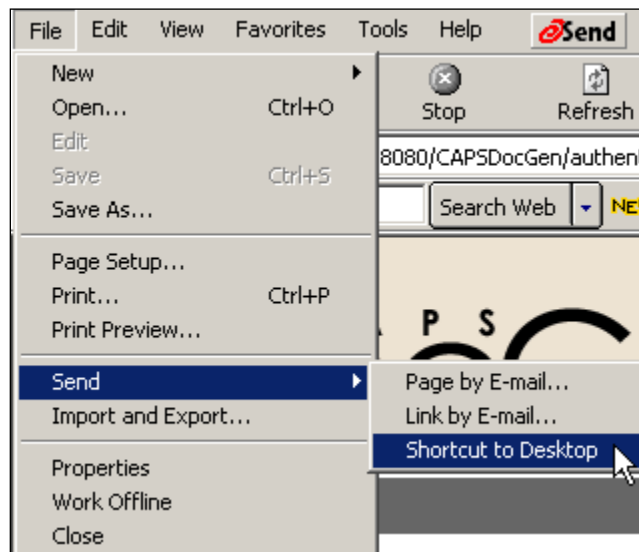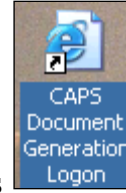
> ➢ That's all there is to it! The icon may look something like this . From now on, you can access the CAPS DocGen Logon screen by double-clicking this icon.
> ➢ If you are unable to create a shortcut following this format, or this option isn't available to you, please contact the DPHHS Help Desk at 444-9500. They will be able to help you create this shortcut.
> ➢ If you prefer, you may also add the CAPS DocGen Logon screen to your list of favorites by clicking FAVORITES, then selecting ADD TO FAVORITES.

Logging On

Before you can access the system, you must logon first. To logon, enter your mainframe USER ID and PASSWORD (this is the same ID and password you use to log onto the CAPS system. Once you have entered your ID and password, click on the Submit button or simply press your Enter key.

If you experience any problems logging in to the system, there is a "contact the CAPS Help Desk" link to the right of the logon fields. When you click this link, Outlook will automatically open an e-mail message to the CAPS Help Desk. <u>Be sure to enter what the problem is and/or any error messages you are receiving before you send your message so the problem can be researched more effectively</u>.

Once you log on, the system will display the WELCOME page. From there, you can select any of the options available in the CAPS DocGen system.

Once you log on, the system will display a time clock, letting you know how much longer you have before the system will time out.

Centralized Intake Training - *Reports*   RP-13

General Screen Information

On the left hand side of each screen you should see a menu that looks like this:

Home
Create DocGen
Save Notes
Retrieve Notes
Provider Labels
Logout

Each option will be described in more detail in separate sections, but here is a brief summary:
- ➢ HOME – selecting this button will return you back to the CAPS DocGen Home/Welcome page.
- ➢ CREATE DOCGEN – selecting this button will take you to the Document Generation page where you will select the document you wish to generate.
- ➢ SAVE NOTES – selecting this button will take you to the Save Notes page where you will identify the notes association and file location of the notes document you saved previously.
- ➢ RETRIEVE NOTES – selecting this button will take you to the Retrieve Notes page where you will identify the notes association and appropriate ID number.
- ➢ PROVIDER LABELS – selecting this button will take you to the Provider Labels Request page where you can generate mailing labels for licensed facilities (this function will primarily be used by provider licensing staff.)
- ➢ LOGOUT – selecting this button will initiate your logoff from the CAPS DocGen system. **NOTE: it is important that you click the logout button when you are ready to leave this system. DO NOT simply click the "X" or select FILE, CLOSE.**

On the bottom of each screen, you should see options that look like this:

DocGen Home | Log Out | Contact CAPS Help Desk
About CAPS DocGen (PDF) | CAPS Online | CAPS Training Web Site

Some of these options perform the same function as the buttons on the left side of the screen. Others provide you with quick access to other websites. Here is a brief summary:
- ➢ DocGen Home – selecting this option will return you back to the CAPS DocGen Home/Welcome page.
- ➢ Log Out – selecting this option will initiate your logoff from the CAPS DocGen system. **Again, it is important to select either the logout button on the menu, or the logout link on the bottom of the screen when you are ready to leave this system.**
- ➢ Contact CAPS Help Desk – selecting this option will cause Outlook to automatically open an e-mail message to the CAPS Help Desk.
- ➢ About CAPS DocGen (PDF) – selecting this option will open a document that contains the information you are reading right now!

➢ CAPS Online – selecting this option will open a separate browser window where you can log into CAPS using online Attachmate. For further information on how to access CAPS online, contact the ITSD Help Desk at 444-2000 or isdcustsup@state.mt.us.

➢ CAPS Training Web Site – selecting this option will open a separate browser window where you can access information like the CAPS training schedule, CAPS training manuals, and the CFSD policy manual.

Home Button

Selecting the Home Button from the menu (or the DocGen Home link at the bottom of the screen) will return you back to the CAPS DocGen Home/Welcome page. **Do not use the BACK button**.

If you see **Welcome Mary Reynolds** (except with your name), you know you are on the Home/Welcome page.

Save Notes Button

This is the button you will select when you want to associate notes to a person, client, report/request, provider/facility or juvenile probation referral. When you select the Save Notes button, you will be taken to a screen where you should see the following:

Save Notes

Document Type: ○ Client
○ Report/Request
○ Provider/Facility
○ Person

Enter ID Number: _____

Confirm

There are a couple of important things to remember regarding the Notes feature:
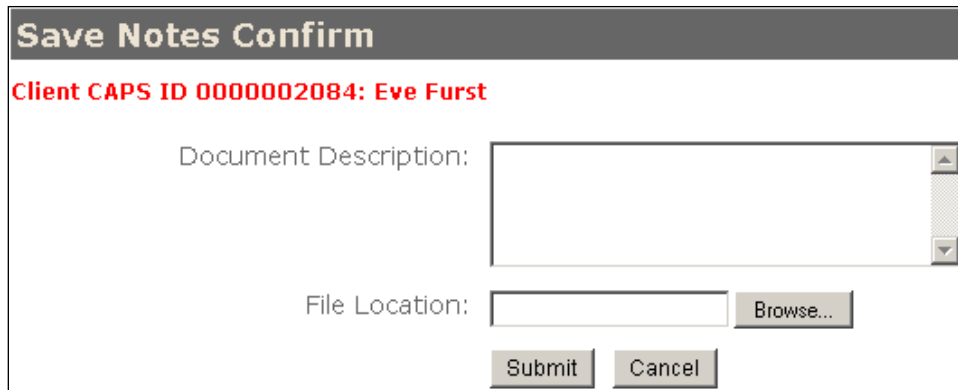➢ Notes are no longer associated to a specific screen in the CAPS system.
➢ Notes no longer require the use of WordPerfect word processing software.
➢ You can save your notes initially wherever you would like (for example, on disk, in a shared directory or in your C: directory.)

You can type your notes using any word processing software. As a matter of fact, you don't have to use any word processing software at all. For example, if you have a spreadsheet in Excel, or a downloaded picture that you would like to attach as notes, you can!
➢ **IMPORTANT NOTE**: Regardless of the program that you use to save your notes, be

sure to use the standard extensions that are assigned to these documents (for example, Word uses .doc, WordPerfect uses .wpd, Excel uses .xls). If you create "special" extensions (for example, .123 or .bob) the system does not know what program was used to create the document and will be unable to open it when it is selected for retrieval.

When you are ready to save your notes to CAPS, select the appropriate Document Type, enter the appropriate ID number, and then click [Confirm]. You should then be taken to a screen where you should see the following:

This is the Save Notes Confirm box. You will be able to view exactly who or what the notes will be associated with before you attach them. <u>Make sure you are associating the notes to the correct person, client, provider, report or juvenile referral before submitting your file!</u>

Enter a Document Description (you have space to enter up to 200 characters – this is to be considered a "title" for your notes), and then enter the File Location for your document (you can click on the [Browse...] button to search for your document if you are unsure of the location.)

Click [Submit]. If the notes were stored, you should see message "File successfully uploaded" displayed in red at the top of the screen.

Retrieve Notes Button

This is the button you will select when you want to retrieve notes associated to a person, client, report/request, provider/facility or juvenile probation referral. When you select the Retrieve Notes button, you will be taken to a screen where you should see the following:

Retrieve Notes

Document Type: ○ Client
               ○ Report/Request
               ○ Provider/Facility
               ○ Person

Enter ID Number: [＿＿＿＿＿＿＿]

[List Files]

To retrieve the notes associated with a person, client, report/request, provider/facility or juvenile probation referral, select the appropriate document type and then the appropriate ID number.

Click [List Files]. The system will search for any notes associated to the document type and ID number that you have entered. If there are no notes, you will receive the following message: "there are no notes stored for the requested ID." If there are notes, the system will display a list that will look similar to this:

Download Document(s)

Type: Client , ID number: 00001005

Click the filename to download:

Date	Filename	Description	Worker
04/21/2004	autotab_example.txt	This is a cursor test	Mcrae, Scott
04/08/2004	This a save test.doc	save test	Holling, Paula
04/02/2004	Hardware Software Settings.doc	d	Miller, Todd
03/30/2004	javaProxySetting.txt	test	Scheetz, Gerry

This list will display the date the notes were saved, the filename, a description of the notes, and the name of the worker that saved the notes.

To open a document, simply click on the Filename and the document will open in the program that it was saved in. (The exception to this is documents saved in WordPerfect (.wpd extension) will be opened in Word.)

Logout Button

This is the button you will select when you are finished using the CAPS DocGen system. **It is important that you click the logout button when you are ready to leave this system. DO NOT simply click the "X" or select FILE, CLOSE.**

When you select the Logout button, you will be taken back to the Logon screen where you should see the following**:**

Please Logon

Successfully logged out of system! Please close all browsers to complete this process.

User Id:
Password:

Submit

Once you receive this message, then you can click the "X" or select FILE, CLOSE. This will completely log you out of the CAPS DocGen system.